

Message Text

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ACTION NEA-10

INFO OCT-01 ISO-00 SP-02 CIAE-00 DODE-00 INR-07
NSAE-00 PA-01 USIA-06 PRS-01 IO-13 AID-05 EB-08
IGA-02 COME-00 TRSE-00 OMB-01 AGRE-00 /057 W
-----019347 270655Z /11

R 251115Z JAN 78
FM AMEMBASSY COLOMBO
TO SECSTATE WASHDC 9380
INFO AMEMBASSY NEW DELHI
AMEMBASSY ROME

LIMITED OFFICIAL USE SECTION 1 OF 3 COLOMBO 0422

DEPT PASS USDA FOR PL 480 TITLE I COORDINATOR NORTON;
NEW DELHI FOR AGATT
ROME FOCDFOG

E.O. 11652: N/A
TAGS: EAID, EAGR, ECON, EALR, PINT, CE

SUBJ: SRI LANKA FOOD GRAIN SITUATION IN MID-JANUARY

REF: (A) COLOMBO 095 (NOTAL); (B) 77 COLOMBO 4576 (NOTAL);
(C) 77 COLOMBO 4132; (D) 77 COLOMBO 3890

1. SUMMARY: AS OF MID-JANUARY, 1977 PADDY PRODUCTION IS
ESTIMATED AT 81.8 MILLION BUSHEL (1,169,000 METRIC TONS OF
MILLED RICE), UP 36.3 PERCENT OVER 1976'S POOR CROP AND 5.7
PERCENT MORE THAN THE RECORD HARVEST OF 1970. THE PROSPECTS
FOR 1978 ARE GOOD, AND PADDY OUTPUT IS PROJECTED AT 84 MILLION
BUSHEL (1,200,000 MT OF RICE). RICE IMPORTS IN 1978 ARE EX-
PECTED TO BE ABOUT HALF OF THE HIGH 1977 LEVEL. THE OVER-
LOADING OF PADDY MARKETINB BOARD (PMB) STORAGE FACILITIES
HAS EASED SLIGHTLY AND THERE ARE NO LONGER ANY REPORTS OF THE
PMB REFUSING TO BUY PABEY AT THE GUARANTEED PRICE. THE ELI-
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MINATION OF THE RICE AND SUGAR RATIONS FOR THE WEALTHIER HALF
OF THE POPULATION ORIGINALLY SCHEDULED FOR THE FIRST OF JANUARY
IS NOW PLANNED FOR THE FIRST OF FEBRUARY. THE EXPECTED LOSS
OF RATIONED RICE BY 7 MILLION PEOPLE PLUS RISING RICE PRICES
HAVE DRAMATICALLY INCREASED MONTHLY WHEAT FLOUR CONSUMPTION
FROM 45,000 MT LAST OCTOBER TO ALMOST 80,000 MT IN JANUARY.
AS THE PRESENT PRICE OF FLOUR IS LESS THAN HALF THE IMPORTED

COST, THE GOVERNMENT CANNOT AFFORD THE SUBSIDY COST OF THIS HIGH LEVEL OF CONSUMPTION, AND HIGHER FLOUR PRICES ARE EXPECTED IN FEBRUARY. END SUMMARY.

2. RICE

THE FOLLOWING SUPPLY AND DISTRIBUTION TABLE FOR RICE SHOWS PROVISIONAL DATA FOR 1977 AND PROJECTIONS FOR 1978 BASED ON INFORMATION PROVIDED BY THE EXTERNAL RESOURCES DIVISION (ERD), THE FOOD COMMISSIONER'S DEPARTMENT (FCD), AND MINISTRY OF AGRICULTURE TECHNICIANS AS OF MID-JANUARY, 1978. THE PRODUCTION FIGURES SHOWN IN METRIC TONZAARE CONVERTED FROM BUSHELS OF PADDY USING A CONVERSION FACTOR OF 70 BUSHELS OF PADDY EQUALS ONE METRIC TON OF MILLED RICE (AVERAGE MILLING RATE OF 70 PERCENT).

SUPPLY AND DISTRIBUTION OF CE - 1977 AND 1978

(1,000 MT)

	1977	1978
PROVISIONAL PROJECTION		
A. BEGGING STOCKS	60	170
B. PROJECTION	1,169	1,200
	(81.8 MN BU)	(84.0 MN BU)
(1) MAHA	783	800
	(54.8 MN BU)	(56.0 MN BU)
(2) YALA	386	400
	(27.0 MN BU)	(28.0 MN BU)
C. IMPORTS	543	272
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(1) COMMERICAL	KZQT	272
FROM: PRC	109	32
BURMA	102	140
PAKISTAN	147	100
THAILAND	157	--
(2) CONCESSIONAL	28	--
FROM: US PL 480	21	---
YUGOSLAVIA	7	

D.H

OTAL SUPPLY	P1,772	1,642
(APLUSBPLUSC)		
E. CONSUMPTION	1,448	1,391
(I - F)		
F. SEED, FEED, WASTE	154	151
G. EXPORTS	NIL	NIL
H. ENDING STOCK	170	100
I. TOTAL DISTRIBUTION	1,602	1,542
(D - H)		

NOTE: RICE IMPORTS FROM BURMA REPRESENT PURCHASES BY THE PEOPLE'S REPUBLIC OF CHINA (PRC) FOR SHIPMENT TO SRI LANKA TO FULFILL COMMITMENTS UNDER RICE/RU OER BARTER AGREEMENTS. SEED, FEED, AND WASTE ARE ESTIAMTED AT 12 PERCENT OF PRO-

DUCTION PLUS 2.5 PERCENT OF IMPORTS.

3. RICE PRODUCTION IN 1977

THE LATEST PRODUCTION FIGURES FOR 1977 ARE UNCHANGED FROM THOSE SHOWN IN REFTEL C WITH TOTAL OUTPUT PROVISIONAL SET AT 81.8 MILLION BUSHELS OF PADDY (1,169 MILLION MT OF RICE), OR 5.7 PERCENT MORE THAN THE PREVIOUS RECORD HARVEST IN 1970, AND 36.3 PERCENT ABOVE 1976'S POOR HARVEST. THE 1977 MAHA (MAJOR CROP HARVESTED IN THE SPRING) WAS AN ACTUAL 54.8 MILLION BUSHELS OF PADDY (783,000 MT OF RICE) WHILE THE 1977 YALA (MINOR CROP HARVESTED IN THE FALL) IS PROVISIONALLY ESTIMATED AT 27 MILLION BUSHELS OF PADDY (386,000 MT OF RICE). THE FINAL FIGURE ON THE YALA CROP SHOULD BE AVAILABLE NEXT MONTH. THE EXCELLENT PRODUCTION PERFORMANCE IN 1977 WAS DUE TO GOOD RAINS, ADEQUATE LIMITED OFFICIAL USE

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FERTILIZER DISTRIBUTION, AND EXPANDED IRRIGATED ACREAGE UNDER THE FIRST STAGE OF THE MAHAWELI PROJECT.

4. RICE IMPORTS AND CONSUMPTION IN 1977

AT 543,000 MT, RICE IMPORTS IN 1977 WERE SOMEWHAT HIGHER THAN THE 503,000 MT PREVIOUSLY ESTIMATED (REFTELS C AND D). ACCORDING TO THE FOOD COMMISSIONER'S DEPARTMENT (FCD), IMPORTS FROM THE PRC AND BURMA WERE A BIT MORE THAN ORIGINALLY EXPECTED. TOTAL RICE CONSUMPTION IN 1977 IS PROVISIONALLY ESTIMATED AT 1,448,000 MT, WHICH WORKS OUT TO ABOUT 228 POUNDS PER CAPITA. OF THE TOTAL, 765,000 MT WERE DISTRIBUTED UNDER

THE RATION PROGRAM, 330,000 MT FREE AND 435,000 SOLD AT THE SUBSIDIZED PRICE OF RS. 1.00 (6.5 US CENTS AT THE CURRENT EXCHANGE RATE OF RS. 15.40 PER US DOLLAR) PER POUND.

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ACTION NEA-10

INFO OCT-01 ISO-00 SP-02 CIAE-00 DODE-00 INR-07
NSAE-00 PA-01 USIA-06 PRS-01 EB-08 COME-00 AID-05
IGA-02 TRSE-00 AGRE-00 OMB-01 IO-13 /057 W
-----047248 270656Z /11
R 251115Z JAN 78

FM AMEMBASSY COLOMBO
TO SECSTATE WASHDC 9381
INFO AMEMBASSY NEW DELHI
AMEMBASSY ROME

LIMITED OFFICIAL USE SECTION 2 OF 3 COLOMBO 0422

DEPT PASS USDA FOR PL 480 TITLE I COORDINATOR NORTON
NEW DELHI FOR AGATT
ROME FOR FODAG

5. GLUT OF PADDY AT THE PMB

DURING 1977, THE PADDING MARKETING BOARD (PMB) PURCHASED APPROXIMATELY 24 MILLION BUSHELS OF PADDY FROM FARMERS. THIS IS EQUIVALENT TO ABOUT 343,000 MT OF MILLED RICE. THE FCD BOUGHT 235,000 MT OF RICE FROM THE PMB FOR DISTRIBUTION UNDER THE RATION WHICH LEFT THE PMB HOLDING THE EQUIVALENT OF ABOUT 108,000 MT OF RICE OR 7.6 MILLION BUSHELS OF PADDY. WHEN OTHER STOCKS ON HAND ARE INCLUDED, TOTAL PMB PADDY HOLDINGS AMOUNTED TO ABOUT 8.2 MILLION BUSHELS AT THE END OF 1977. WHIOE THIS IS DOWN FROM THE MORE THAN 11.1 MILLION BUSHELS HELD AT THE END OF SEPTEMBER (REFTEL D), THERE ARE STILL SOME AREAS OF THE COUNTRY WHERE PMB STORAGE FACILITIES ARE INADEQUATE AND PADDY IS BEING STORED IN THE OPEN. SEVERAL COUNTRIES, INCLUDING THE UNITED STATES, ARE PROVIDING AID TO EXPAND PADDY STORAGE CAPACITY. AS FAR AS THE EMBASSY CAN DETERMINE, THE PMB IS BUYING ALL THE PADDY OFFERED BY FARMERS AT THE NEW GUARANTEED PRICE OF RS. 80 (\$2.60) PER BUSHEL.
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6. RIFE PRODUCTION IN 1978

GROWING CONDITIONS FOR THE 1978 MAHA CROP HAVE BEEN EXCELLENT AND THE HARVEST IS EXPECTED TO EXCEED LAST YEAR'S RECORD. MINISTRY OF AGRICULTURE TECHNICIANS ARE PRESENTLY PROJECTING A MAHA OUTPUT OF 84 MILLION BUSHELS OF PADDY OR 1.2 MILLION MT OF RICE. THE ECON OFFICER RECENTLY FLEW OVER PADDY AREAS ALONG THE MAHWELI GANGA AND IN THE NORTH CENTRAL PROVINCE, AND THE CROP LOOKED VERY GOOD FROM THE AIR. RAIN FALL THROUGH THE END OF DECEMBER HAS BEEN RELATIVELY NORMAL. THE FIRST THREE WEEKS OF JNAUARY, HOWEVER, HAVE SEEN A MUCH DIMINISHED LEVEL OF PRECIPITATION OVER MOST OF THE SLAND. WHILE THIS IS NOT EXPECTED TOHAVE A SERIOUS IMPACT ON THE MAHA HARVEST, AN EXTENDED PERIOD OF BELOW NORMAL RAINFALL COULD AFFECT THE SIZE OF THE YALA CROP. AGRICULTURE OFFICIALS ARE NOT WORRIED AS YET AND ARE CURRENTLY PROJECTING AYALA HARVEST OF 28 MILLION BUSHELS PADDY (800,000 MT OF RICE).

7. THE NEW RATION PROGRAM

AS EXPLAINED IN REFTEL B, THE GOVERNMENT PLANS TO ELIMINATE THE RICE AND SUGAR RATIONS FOR THE WEALTHIER HALF OF THE POPULATION. UNDER THE PROPOSED NEW RATION PROGRAM, ABOUT 7 MILLION PEOPLE WOULD CONTINUE TO RECEIVE THE WEEKLY RATION OF ONE POUND OF RICE FREE AND THREE ADDITIONAL POUNDS AT A SUBSIDIZED PRICE OF RS. 1.00 (6.5 US CENTS) PER POUND. ADMINISTRATIVE PROBLEMS IN DETERMINING WHO SHOULD LOSE THE RATION ON THE BASIS OF INCOME LEVELS DELAYED IMPLEMENTATION OF THE NEW PROGRAM ORIGINALLY INTENDED FOR THE FIRST OF JANUARY (REFTEL A). THE FCD IS NOW IN THE PROCESS OF REVALIDATING RATION BOOKS AND THE NEW SCHEME IS NOW SCHEDULED TO BEGIN ON THE FIRST OF FEBRUARY.

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8. IMPORTS AND CONSUMPTION IN 1978

RICE DISTRIBUTION UNDER THE RATION IS EXPECTED TO BE ABOUT 65,000 MT IN JANUARY. AFTER THE RATION CUT, THE FCD EXPECTS ALL 7 MILLION PERSONS ELIGIBLE WILL DRAW THE FULL RATION, AND CONSUMPTION WILL AVERAGE AROUND 55,000 MT PER MONTH. THUS, TOTAL RICE CONSUMPTION UNDER THE RATION IN 1978 SHOULD BE IN THE NEIGHBORHOOD OF 670,000 MT. THE PMB HAS CONTRACTED TO SUPPLY THE FCD WITH 420,000 MT OF RICE FOR THE RATION PROGRAM DURING 1978. THIS WOULD LEAVE A RESIDUAL AMOUNT OF 250,000 MT TO BE IMPORTED. THE FCD HAS ALREADY ARRANGED FOR IMPORTS OF 272,000 MT OF RICE (SEE TABLE ABOVE). THE EMBASSY UNDERSTANDS, HOWEVER, THAT THE GOVERNMENT HAS ASKED THAT THE PEOPLE'S REPUBLIC OF CHINA (PRC) DELAY RICE SHIPMENTS UNDER THE RICE/RUBBER BARTER AGREEMENT UNTIL LATER IN THE YEAR TO HELP TAKE SOME OF THE PRESSURE OF THE PMB'S STORAGE FACILITY.

9. IN ADDITION TO THE RATION PROGRAM, THE FCD IS TRYING TO CONTAIN INFLATIONARY PRESSURES IN THE NON-RATION RICE MARKET BY SUPPLYING RICE TO COOPERATIVE STORES AND GOVERNMENT RETAIL OUTLETS FOR SALE TO THE PUBLIC AT THE COST PRICE OF RS. 1.45 (9.4 US CENTS). NON-RATION RICE IS SELLING FOR AS HIGH AS RS. 2.25 (14.6 US CENTS) PER POUND. THE PMB HAS AGREED TO SUPPLY AN ADDITIONAL 10,000 MT OF RICE PER MONTH FOR THIS PURPOSE. TOTAL FCD PURCHASES FROM THE PMB SHOULD TOTAL 540,000 MT, OR THE EQUIVALENT OF ABOUT 38 MILLION BUSHELS OF PADDY. ACCORDING TO AID'S CONTRACT RICE EXPERT, THE CURRENT PROGRAM TO UPGRADE MILLING FACILITIES SHOULD PROVIDE ADEQUATE CAPACITY TO HANDLE THE FCD NEEDS AS WELL AS OPEN MARKET REQUIREMENTS.

10. WHEAT FLOUR

AS WHEAT IS NOT GROWN IN SRI LANKA, THE PRODUCTION FIGURES SHOWN BELOW REPRESENT THE OUTPUT OF THE STATE FLOUR MILLING CORPORATION USING IMPORTED WHEAT GRAIN.

SUPPLY AND DISTRIBUTION OF WHEAT FLOUR - 1977 AND 1978

(1,000 MT)

1977 1978

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PROVISIONAL PROJECTION

A. BEGINNING STOCKS 20 27

B. PRODUCTION (FROM IM-

PORTED WHEAT) 75 78

C. FLOUR IMPORTS 531 626

(1) COMMERICAL 243 450

FROM: FRANCE 68 88

NETHERLANDS 41 55

ITALY 53 30

ARGENTINA 14 12

SINGAPORE 30 118

BELGIUM 22 20

MALAYSIA 3 --

FRG 12 12

BALANCE -- 115

(2) CONCESSIONAL 288 176

FROM: US PL 480 200 100

EC 30 15

CANADA 26 22

AUSTRALIA 8 8

FRANCE -- 5

ITALY 4 4

FRG 13 7

NETHERLANDS 6 5

YUGOSLAVIANK 1 --

OTHERS -- 10

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ACTION NEA-10

INFO OCT-01 ISO-00 SP-02 CIAE-00 DODE-00 INR-07

NSAE-00 PA-01 USIA-06 PRS-01 AID-05 EB-08 IO-13

COME-00 TRSE-00 OMB-01 IGA-02 AGRE-00 /057 W

-----019779 270654Z /11

R 251115Z JAN 78

FM AMEMBASSY COLOMBO
TO SECSTATE WASHDC 9382
INFO AMEMBASSY NEW DELHI
AMEMBASSY ROME

LIMITED OFFICIAL USE SECTION 3 OF 3 COLOMBO 0422

DEPT PASS USDA FOR PL 480 TITLE I COORDINATOR NORTON
NEW DELHI FOR AGATT
ROME FOR FODAG

D. TOTAL SUPPLY	626	731
(APLUSBPLUSC)		
E. CONSUMPTION	583	637
(I - F)		
F. SEED, FEED, WASTE	16	18
G. EXPORTS	NIL	NIL
H. ENDING STOCK	27	76
I. TOTAL DISTRIBUTION	599	655
(D - H)		

NOTE: SEED, FEED, AND WASTE ARE ESTIMATED 2.5 PERCENT OF TOTAL SUPPLY.

11. FLOUR CONSUMPTION IN 1977

TOTAL WHEAT FLOUR CONSUMPTION IN 1977 WAS 626,000 MT WHICH IS ALMOST EXACTLY THE AMOUNT PROJECTED AT THE BEGINNING OF LAST YEAR. AS POINTED OUT IN REFTEL B, THE FCD'S PROJECTIONS OF ANNUAL FLOUR CONSUMPTION WERE REDUCED GRADUALLY TO THE 554,000 MT FIGURE GIVEN AT THE END OF SEPTEMBER. WHILE CONSUMPTION WAS LIMITED OFFICIAL USE

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SLOW TO RESPOND TO THE AUGUST REDUCTION IN FLOUR PRICES FROM RS. 0.80 TO RS. 0.60 (5.2 TO 3.9 US CENTS PER POUND) RUMORS OF THE IMPENDING REDUCTION IN THE RICE RATION INEARLY NOVEMBER, AND THE INCREASE IN RICE PRICES FOLLOWING THE NOVEMBER 15 ANNOUNCEMENT OF A HIGHER GUARANTEED PRICE FOR PADDY SHARPLY INCREASED THE DEMAND FOR FLOUR. THE MORE EXPENSIVE GRADES OF RICE ARE NOW SELLING AT FOUR TIMES THE PRICE OF FLOUR AND BREAD. AS A CONSEQUENCE, FLOUR CONSUMPTION JUMPED FROM ABOUT 45,000 MT IN OCTOBER TO ABOUT 70,000 MT IN BOTH NOVEMBER AND DECEMBER. THE FCD WAS AFRAID STOCKS WILL BE EXHAUSTED AND PLACED IMMEDIATE ORDERS FRO FLOUR FROM SINGAPORE. SEVERAL SHIPS ARE NOW UNLOADING AT VARIOUS PORTS AROUND THE ISLAND AND SOME 160,000 MT OF FLOUR ARE TO BE IMPORTED IN THE FIRST TWO MONTHS THIS YEAR.

12. FLOUR CONSUMPTION IN 1978

AT THE CURRENT PRICE OF RS. 0.60 (3.9 US CENTS) PER POUND, THE GOVERNMENT IS SELLING FLOUR AT LESS THAN HALF THE IM-

PORTED COST. IN THE FIRST PART OF JANUARY, FLOUR CONSUMPTION WAS RUNNING AT A MONTHLY RATE OF ABOUT 80,000 MT. IF THIS LEVEL OF CONSUMPTION WERE CONTINUED THROUGHOUT THE YEAR, THE FLOUR SUBSIDY (INCLUDING INTERNAL DISTRIBUTION COSTS) WOULD COST THE GOVERNMENT ABOUT 120 MILLION IN 1978 AT CURRENT WHEAT PRICES. THIS IS CLEARLY MORE THAN THE GOVERNMENT CAN AFFORD, AND FLOUR PRICES ARE EXPECTED TO BE RAISED SHORTLY AFTER J.R. JAYEWARDENE'S INAUGURATION AS PRESIDENT ON FEBRUARY 4. IT IS NOT CLEAR WHETHER THE PRICE OF FLOUR WILL BE INCREASED TO WORLD MARKET LEVELS IMMEDIATELY OR IN STAGES. IT PRESENTLY COSTS THE GOVERNMENT A TOTAL OF ABOUT RS. 1.60 (10.4 US CENTS) TO DELIVER A POUND OF FLOUR TO THE CONSUMER. AT THIS PRICE, CONSUMPTION WOULD PROBABLY DROP BACK TO AROUND 45,000 MT PER MONTH.

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13. IN MID-JANUARY, THE FCD PROJECTED 1978 FLOUR CONSUMPTION AT 637,000 MT, UP 9.3 PERCENT OVER 1977. THIS SHOULD BE CONSIDERED A VERY TENTATIVE GUESS, SINCE THE FCD IS NOT PRIVY TO FLOUR PRICE POLICY WHICH IS MADE BY THE CABINET.

14. PL 480

THE US AND SRI LANKA SIGNED THE FY 1978 PL 480 TITLE I AGREEMENT FOR 100,000 MT OF FLOUR ON JANUARY 9. SRI LANKA HAD REQUESTED THAT 200,000 MT OF FLOUR BE PROVIDED UNDER PL 480 WHICH WAS THE SAME AMOUNT AS HAD BEEN SUPPLIED UNDER THE FY 1977. IT WAS EXPLAINED TO THE SRI LANKANS, HOWEVER, THAT THE EXTRA 100,000 MT UNDER THE FY 77 AGREEMENT HAD BEEN PROVIDED TO ASSIST SRI LANKA DURING A PERIOD OF DROUGHT AND SEVERE BALANCE OF PAYMENT DIFFICULTIES. THE SRI LANKANS ARGUED THAT 200,000 MT WERE NEEDED THIS YEAR TO HELP THE GOVERNMENT'S NEW ECONOMIC POLICIES (SEE 77 COLOMBO 5101). A FINAL DECISION ON THE SECOND 100,000 MT UNDER THE FY 78 AGREEMENT IS STILL PENDING.

WRIGGINS

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Message Attributes

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